**Catholic Diocese of St. Petersburg**

**IRA Sample Letter of Instruction – *Parish***

Owner/Donor Name

Address

City, State Zip

To: IRA Administrator

 (Company Name)

 (Company Address)

 (Company City, State Zip)

Dear Sir or Madam:

Please accept this letter as my request to make a direct charitable distribution from my Individual Retirement Account (IRA), Account #\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_. This distribution is intended to be a Qualified Charitable Distribution (QCD) that will qualify for exclusion from my taxable income during the \_\_\_\_\_\_ tax year.

Please issue a check in the amount of $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ payable to Diocese of St. Petersburg, Florida for

(Name of Parish) Catholic Church.

Please send the check to the following address: Diocese of St. Petersburg

ATTN: Processing Office

PO Box 40200

St. Petersburg, FL 33743-0200

The Diocese of St. Petersburg is a qualified charitable recipient for this transfer. The tax ID number for the Diocese of St. Petersburg is 59-1213195.

(Name of Parish) Catholic Church is a qualified charitable recipient. The tax ID number for (Name of Parish) Catholic Church is \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.

I am supplying the Diocese of St. Petersburg and (Name of Parish) Catholic Church with a copy of this communication.

Please indicate my name and address as the donor of record in connection with this transfer, and please copy me on your transmittal.

If you have any questions, I can be reached at \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_. Thank you for your assistance in this matter.

Sincerely,

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Signature Date

**Catholic Diocese of Saint Petersburg**

**IRA Sample Letter of Instruction – *Parish***

|  |
| --- |
|  |
| Owner/Donor Name |
|  |
| Address |
|  |  |  |
| City | State | Zip |

To: IRA Administrator

|  |
| --- |
| Company Name |
|  |
| Company Address |
|  |  |  |
| City | State | Zip |

Dear Sir or Madam:

Please accept this letter as my request to make a direct charitable distribution from my Individual Retirement Account (IRA), Account #\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_. This distribution is intended to be a Qualified Charitable Distribution (QCD) that will qualify for exclusion from my taxable income during the \_\_\_\_\_\_ tax year.

Please issue a check in the amount of $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ payable to Diocese of St. Petersburg, Florida for (Name of Parish) Catholic Church.

Please send the check to the following address: Diocese of Saint Petersburg

ATTN: Gift Acceptance Office

PO Box 40200

St. Petersburg, FL 33743-0200

The Diocese of St. Petersburg is a qualified charitable recipient for this transfer. The tax ID number for the Diocese of St. Petersburg is 59-1213195.

(Name of Parish) Catholic Church is a qualified charitable recipient. The tax ID number for (Name of Parish) Catholic Church is \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.

I am supplying the Diocese of St. Petersburg and (Name of Parish) Catholic Church with a copy of this communication.

Please indicate my name and address as the donor of record in connection with this transfer, and please copy me on your transmittal.

If you have any questions, I can be reached at \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_. Thank you for your assistance in this matter.

Sincerely,

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Signature Date